

Of curiosity and cats: how to secure clients' loyalty

Being curious and finding commonality with clients and colleagues are key to a committed relationship built around certainty, autonomy, trust and status, says Dr Alicia Fortinberry



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What do you do to prepare for an important meeting with a client or colleague? Review the facts, your advice, perhaps answers to any questions that might arise?

All these are good, but research suggests you are leaving out a vital component – in fact, several – that could build commitment, respect and adoption of your views and opinions. One that would persuade your team to work better and smarter for you, your colleagues to be more collaborative and supportive, and the client to repeatedly engage you – and even pay your bill.

That missing component is the questions you might ask. Where is your curiosity about the person or people, as well as about the matter or internal issue?

People do not make decisions based on facts or reason. Ask any behavioural scientist or economist. Usually unconsciously, people choose actions or adopt opinions based on emotion and relationship.

Hence all the fuss these days about being a trusted adviser. If clients see you as an essential part of their support network, their brain and even their behavioural genes will organise themselves to take on you and your advice in order to maintain and strengthen the relationship.

How do you ensure that commitment, if not by showing how clever and well informed you are?

You do it firstly by showing interest in them. That's what the chit-chat at the start of meetings is for. But remember, banter and gossip have a purpose: strengthening the relationship. Talking just for the sake of saying something, or to impress them, won't necessarily do that.

FINDING COMMONALITY

A good strategy is to find out or reaffirm interests, values or preferences you have in common.

Why is commonality so important? Due to our genetic heritage from living in small hunter-gatherer bands, where we felt safe, we look to bond with people of our 'tribe' or group. We instantly make the decision to

trust or not based on whether we perceive the person as part of our tribe, often based on superficial characteristics. To reinforce the sense of tribe, or establish it on a deeper level, find out and articulate similarities.

In neurogenetic terms, asking about others and reinforcing commonalities stimulates the action of oxytocin, the trust neurochemical. Along with other reward neurochemicals, oxytocin galvanises those parts of the brain that drive decisions and action.

In most cases the human system is more interested in the number of things you have in common than the weight of them. For example, sharing a favourite sports team or fashion brand may have just as much weight as agreeing the firm's values.

Once identified, it's important to note the commonality out loud, so their brain takes note: "We both prefer cool weather to warm weather, tennis to golf."

What do they like to do on vacation? If you both like skiing, you can share notes on your favourite places or powder conditions. Even if you don't enjoy skiing, showing curiosity about their interests creates a bond.

WHAT THE ISSUE MEANS TO THEM

As the meeting progresses, your questions can subtly direct the conversation, deepen your understanding of them and the issue, and demonstrate that you are interested in helping (and not judging).

What does the matter at hand mean to them in terms of their hopes, fears, position within the firm or with their customers or clients? What are their concerns? How will the outcome affect their need for certainty, autonomy, trust and status? These are the four human neurogenetic drivers. To help you remember them so you can best focus your curiosity, we have created an acronym: CATS.

Certainty is vital to human beings. We don't like change and we want to know what's coming next – one of our reasons for relying on lawyers (who as a group are probably particularly uncomfortable with ambiguity). But you can offer some degree of certainty to your client in many ways, and it's important to know what is most important to



them. How would they like you to keep them informed? What are they willing to give up to enhance predictability?

Autonomy, or sense of control over one's work or life, also means different things to different people. Some clients may want you to make day-to-day decisions and just come to them at important junctures. Others may want you to check in with them at every decision point. Finding out their preferences in these areas will demonstrate your intention to listen and support them. It will also begin to get them picturing your working together in a positive way and predispose them to doing so.


Trust is of course the hub of any relationship. It's not only people's confidence in your abilities, but the feeling that you have their back, that you are part of their support network. Find out what trust means to them. There are five main attributes of trust, but they have different weighting for different people, and can be demonstrated differently according to circumstance.

The main elements of trust, besides commonality, are communication (optimally frequent and face to face), competence (the ability to do what you say you will), congruence (keeping your word, responding predictably) and benevolent concern (going out of your way to help).

Status isn't just the new expensive car or even job title. It's about how much value you have to others, your position in the tribe, so to speak. And this determines your relationship safety, which to a human is the greatest security of all.

It's also subjective. Like self-esteem, your sense of status comes from how you perceive others perceive you. Your clients and colleagues – even family and friends – are unconsciously constantly scanning you for clues as to whether you still value them, whether the relationship is secure. As you are with them.

If you can help secure your clients' and colleagues' sense of status with others as well as yourself, you will be a very important part of their support network. So be sure to use your curiosity to determine who is important to them, and how what you do with them will help ensure others' regard. Ask a client, for example, who else is affected by the outcome of the matter. If they are a member of a large organisation, how would the outcome affect their standing with management or others. If it's a family business, how will it affect family members. Or, if individuals, how will the outcome impact their standing in the community? How can you work with them to ensure this is maintained or heightened?

Curiosity not only binds you to clients and colleagues as a trusted adviser. It is also the strongest aspect of developing team members. Habitually asking the important questions – and encouraging others to – could be your most important non-financial contribution to your firm or practice group. Habitually challenging assumptions (70 per cent of which are wrong, according to research) as part of finding innovative solutions can help you stay relevant and successful in a profession undergoing massive change. 



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